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MEMORANDUM FOR: Special Planning Assistant to the Deputy Director
for Support

SUBJECT : Status Report on the Retirement Counseling Program

REFERENCE : Memo dtd 29 Aug 68 to D/Pers fr SPA/DDS, Subj: BOB
Questions Re FY 1970 Program-Wide Prg. Memo

1. Background

In June 1967 the Agency decided to establish a more comprehensive pre-retirement counseling program designed to contribute to the resolution of the imbalance of senior (both in age and years of service) personnel in most components of the organization. This imbalance developed as a natural consequence of the circumstances of staffing the Agency during its formative period, 1947 to the early 1950's. The massive staffing requirements of the early years resulted in a block or "hump" of employees of essentially the same age and years of service moving forward toward seniority at the same time.

The Agency is entering a period where this group of employees is now becoming eligible for optional early retirement but are five to ten years from mandatory retirement. A serious blockage of promotions, succession and developmental assignment opportunities for younger officers looms in the immediate future unless an increasing number of these senior officers can be encouraged to elect early retirement as soon as practicable.

This group of senior officers has provided a career of dedicated and effective service which deserves recognition and humane consideration. The solution must be found which avoids arbitrary administrative action but which would encourage an appreciable portion of this group to recognize the need and desirability of their retirement prior to reaching mandatory age.

It was apparent that reliance on routine retirement processes was insufficient to accelerate the numbers of voluntary early retirements and the number of scheduled mandatory retirements are too few to meet the desired objectives.

On 18 September 1967 a special retirement counseling staff or task force was organized to analyze the problem, develop plans and programs and initiate actions which would stimulate eligibles to "opt out" in greater numbers.

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2. Activities of the Retirement Counseling and Placement Staff

a. 18 September - 31 December 1967

During this initial period the retirement staff concentrated its efforts on research and the development of program plans. These studies included:

- (1) Detailed analysis of the Agency's retirement eligibles to ascertain their age/grade/years of service, attitudes toward retirement, planning for retirement and probable responsiveness to encouragement or incentives.
- (2) Extensive research of the literature of retirement and preparation for retirement.
- (3) Review of pre-retirement counseling and assistance programs in other organizations, both in public and private sectors.

On the basis of these studies it was concluded that the majority of eligibles and employees facing mandatory retirement were not emotionally conditioned nor financially prepared for transition to retired life and, left on their own, had done little in the way of advance planning. It was indicated that initial pre-retirement counseling or conditioning was necessary and ideally should be initiated at least five years prior to the planned retirement date. For those eligibles whose planned retirement dates were less than five years, special programs were required. The following program plans were developed and implemented to meet these requirements:

- (1) Individual counseling interview services for selected retiree eligibles to encourage them to elect early retirement and to assist them in developing plans for action in this regard.
- (2) Individual counseling interviews for employees on the threshold of mandatory retirement to assist them in successful transition.
- (3) Individual counseling interviews with employees scheduled for retirement in five years. Opportunities for annual follow-up interviews each successive year to retirement. Assistance as appropriate each successive year to assure successful retirement.
- (4) Development of seminar outlines for group presentation to retiree eligibles on at least an annual basis or more often, if necessary.

-2-
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- (5) Acquisition of retirement literature for hand-outs and/or publication in Agency employee bulletins or other media.
- (6) Establishment of Retirement Reading Rooms for employee use.
- (7) Expansion of Agency external employment assistance facilities. This included guidance in preparation of employment history resumes, counseling on job search techniques and development of job lead sources.

b. 1 January - 31 March 1968

Studies on retirement continued during this period and refinements were made in program implementation and techniques. The individual counseling interviews were continued on an increasing volume. Employees responded affirmatively to the services and assistance offered.

In late March 1968 the initial retirement information seminar was presented in the Agency Auditorium. Personal invitations were extended to those employees scheduled for retirement in calendar year 1968 with "open" invitations to all employees. Over the period of five daily two-hour sessions, an average of 315 daily attendance was recorded.

c. 1 April - 30 August 1968

The staff continued its research with particular emphasis on the development of proposals for additional incentives for early retirement. Several of these proposals require legislative authority for implementation and application must be deferred for the future.

The Retirement with Re-employment Rights or "Trial Retirement" program plan was approved in concept and procedural details are being worked out.

Plans were completed for a second retirement information seminar to be presented in early November 1968.

Continued emphasis was placed on expanding external employment lead sources with particular efforts directed toward assistance to employees whose Agency careers were spent in the clandestine services.

Portfolios of selected pre-retirement literature were assembled and forwarded to the Agency's field installations for use of employees eligible for retirement.

3
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3. Results to date

During the relatively short period since the new retirement programs have been in effect, an affirmative change in employee attitudes toward retirement is quite apparent. An increasing number of early retirement eligibles are voluntarily seeking counseling relative to firming up their retirement plans. Employees selected and advised to consider early retirement by the career services have responded with a willingness to cooperate and are seriously preparing their plans. Special counseling and external employment assistance is being provided this type of employee.

During the period 1 January - 31 August 1968 an increase of approximately 20% in optional retirements under the CIA R&D System over the numbers retired in the same period in 1967 occurred.

Agency policies regarding approvals of extensions beyond the normal retirement age have been stiffened and have influenced employees desiring to work beyond age 60 to initiate planning for early retirement in order to compete for jobs in the private sector at a younger age.

4. Projected Activities and Anticipated Results

a. Projected Activities

Based on the encouraging results of program implementation to date, it is intended to continue to expand individual counseling services and to emphasize affirmative aspects of early retirement through every means and media available.

Emphasis will be placed on early identification of eligible employees selected by the career services and special assistance provided these individuals.

Efforts will be sustained to expand external employment job lead sources for specific retirees.

Ideas and proposals on additional incentives for early retirements will be developed and implemented.

b. Anticipated Results


(1) By providing counseling and external employment assistance to employees eligible for optional retirement we expect to accelerate the rate of optional early retirements and reduce the "hump" problem.

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(2) Success in accelerating the rate of early retirements under both CIA and Civil Service Systems promotes the whole flow of promotion and succession to which our recruitment, training and assignment programs are geared. This in turn provides the vigorous and productive force required by the Agency.

(3) While the essential objectives of the retirement assistance program are management oriented, employee interests and well being as well as Agency-employee relations are greatly enhanced by the service provided. Employee attitudes toward retirement are expected to become more affirmative as they continue to be exposed to our counseling program.


Robert S. Wattles
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Next 7 Page(s) In Document Exempt

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